

# Rural wellbeing tourism services – market research results from Prowell- project

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EASTERN FINLAND

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## Managerial summary:

- An online survey was conducted to study the preferences of rural wellbeing tourists, mostly located in Baltic countries.
- 550 useful responses were obtained.
- Respondents prefer a rural holiday of 3-4 nights in neighboring countries in beautiful and quiet surroundings.
- A rural wellbeing holiday must also be sustainable and environmentally friendly.
- Swimming, local food and walking in nature are essential for rural wellbeing holiday.
- Rural wellbeing holiday is very often a family holiday.
- Search engine marketing should be top priority for rural businesses.
- 14 rural wellbeing products were identified, each consisting of variety of core and ancillary services.

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## Research goals:

Market research for identifying the appeal of the products and the right distribution channels.

- Aim is to gather information about customers **interested in Rural Wellbeing tourism offering** and find most **attractive and suitable distribution channels** to support **promotional activities**.

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# Creating the survey

- Literature review in April and May 2015
- Focus group in Hardanger among project participants
  - Identified central themes and questions:
    - Past behavior
    - Rural destination attributes
    - Wellbeing activities
    - Travel motivations
    - Information sources
    - Socio-demographics

# Distributing the survey

- Partner websites with banners
  - Also social media and e-mail marketing were used
- Data collection method limits respondent group!



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# Results

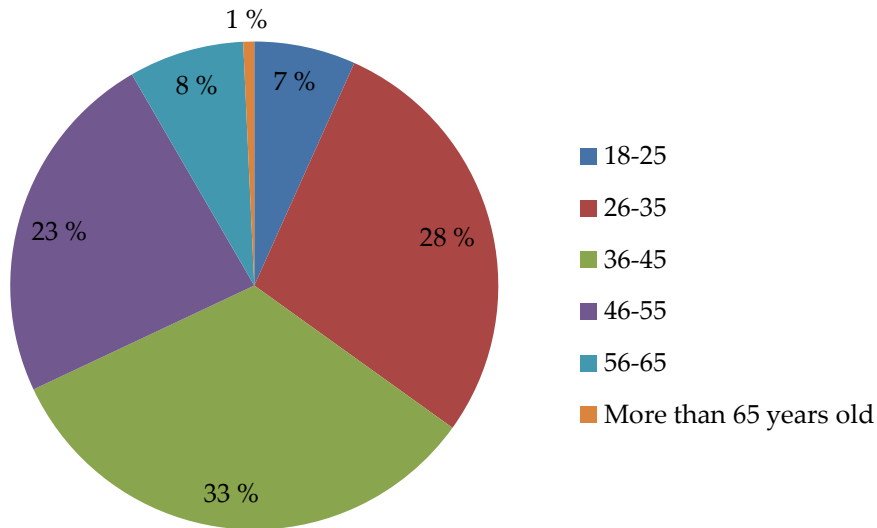
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# Who answered the survey?

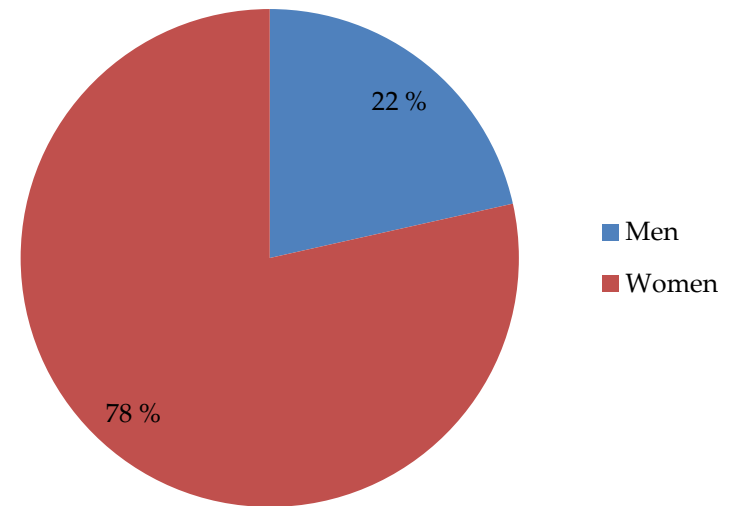
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# 550 completed questionnaires

## Age groups



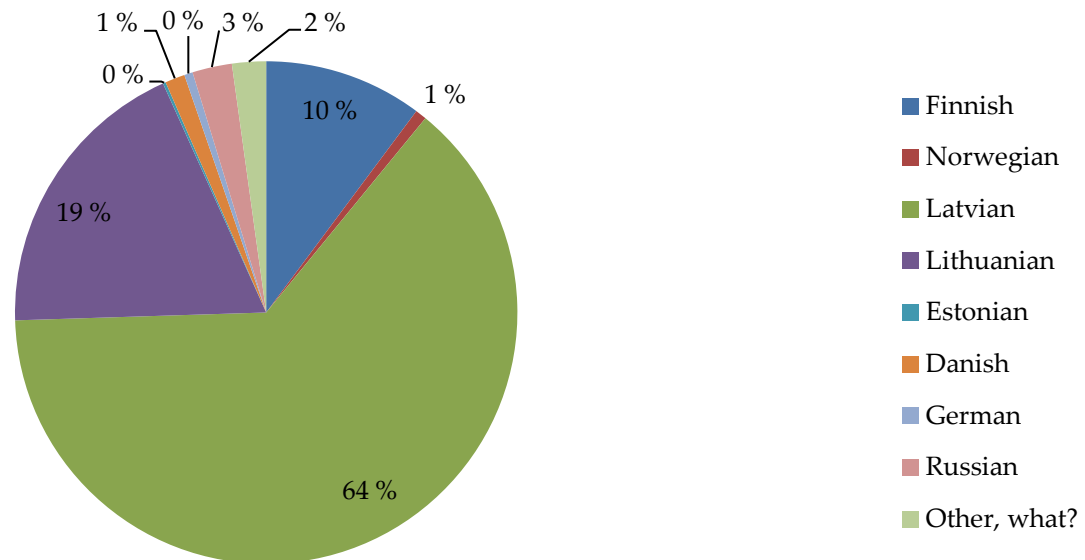
## Gender





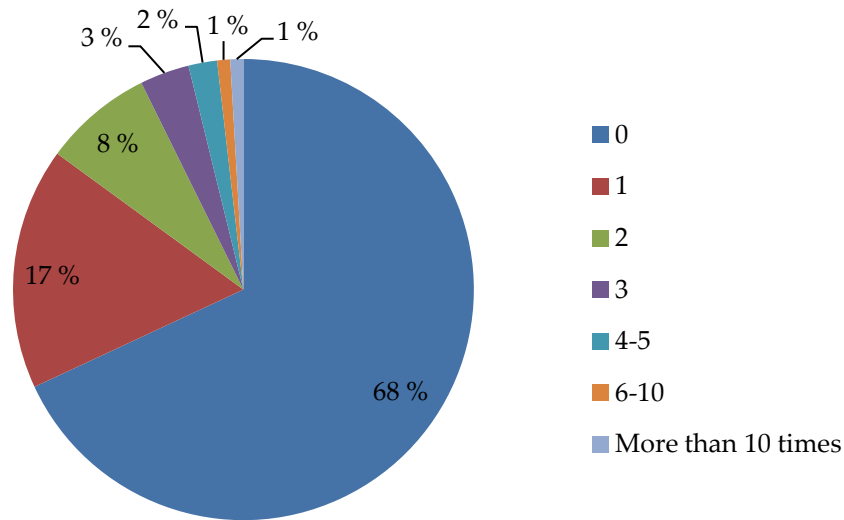
# Nationality

## Nationality of the respondents

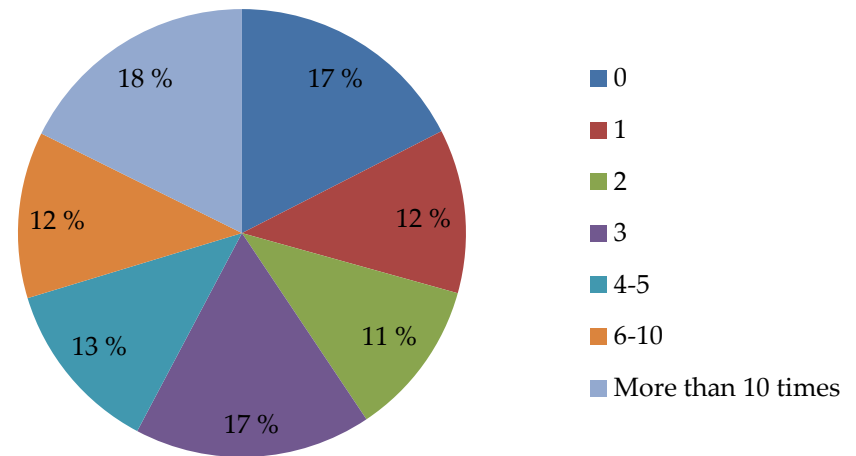


# Rural tourism holidays

How many times during the past three years have you been on a rural holiday in Norway, Denmark, Sweden or Finland



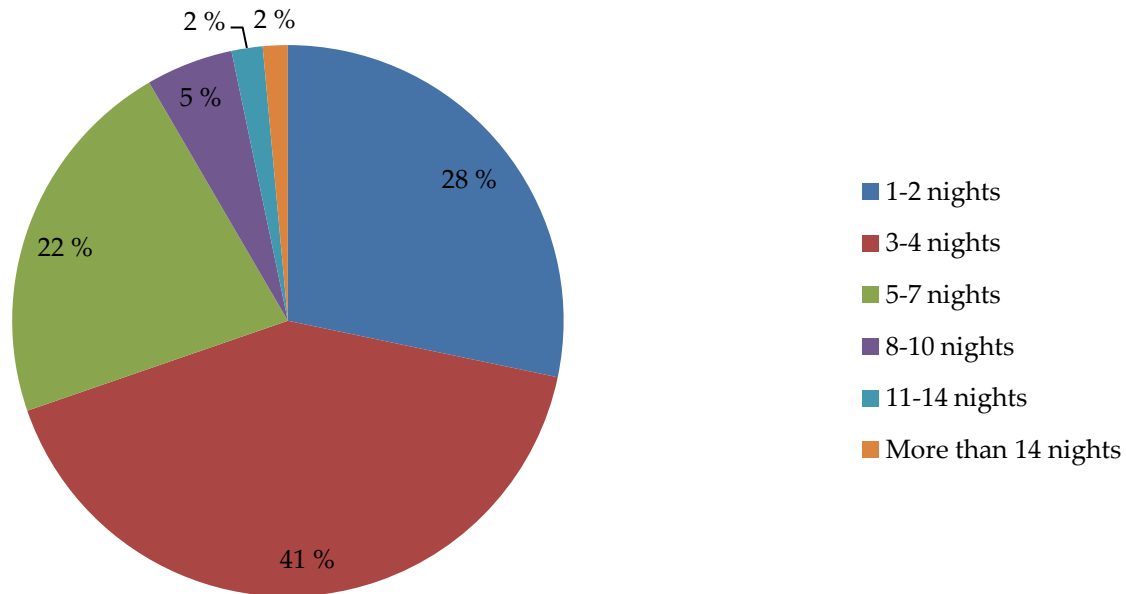
How many times during the past three years have you been on a rural holiday in Estonia, Latvia or Lithuania



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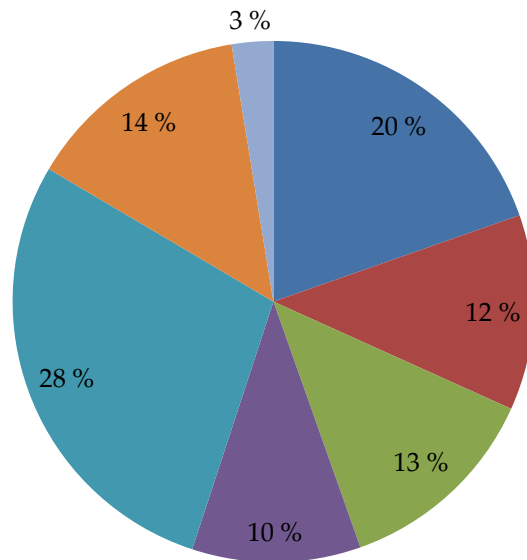
# Preferred duration for a rural wellbeing holiday

## How long rural holiday would you prefer?



# Living area

How would you describe the area you live in (Choose only one):

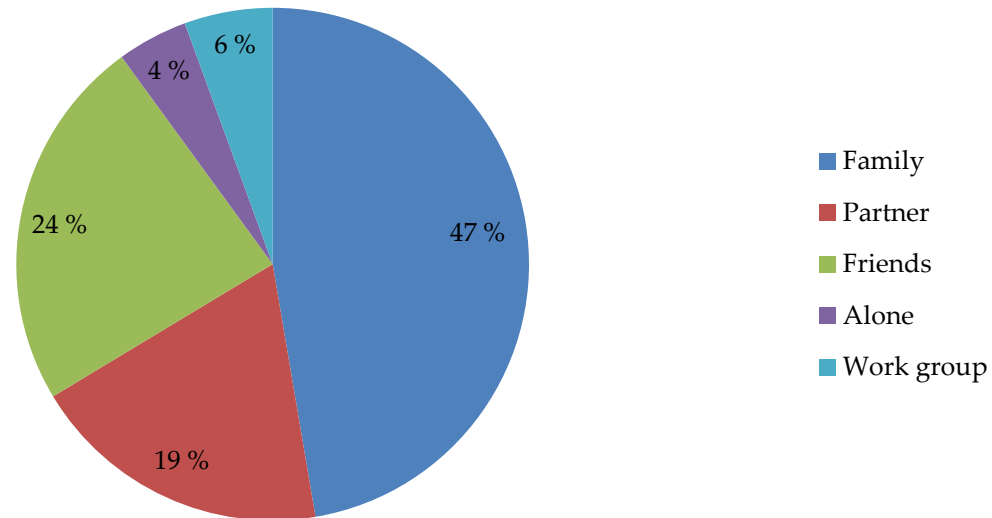


- A large city (100,000 or more inhabitants)
- A medium-sized city (10 000 to 99 000 inhabitants)
- A smaller city (from 2000 to 9999 inhabitants)
- A village (under 2,000 inhabitants)
- A rural area
- Do not know
- Prefer not to answer

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# Preferred rural wellbeing holiday company

## Preferred rural holiday travel group

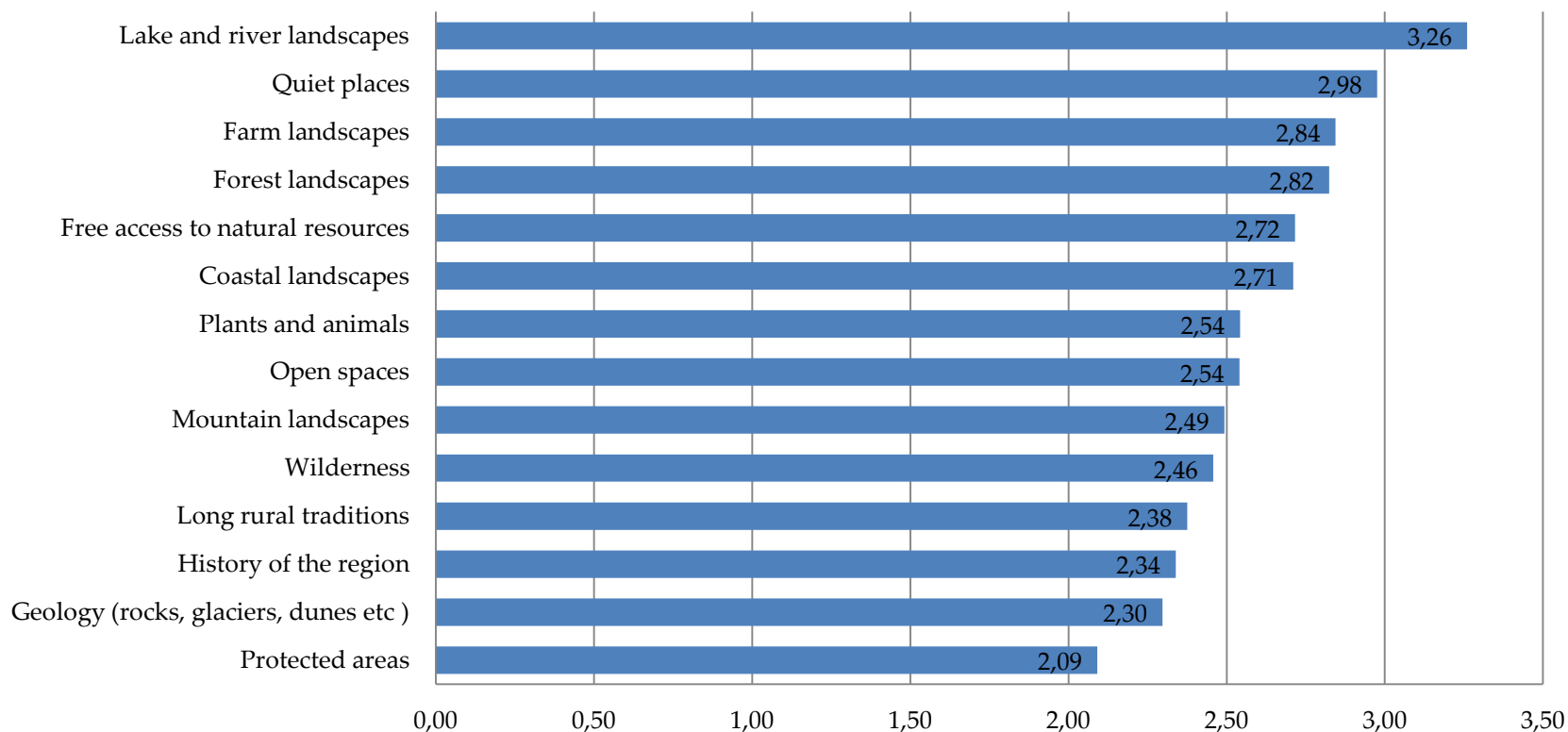


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# What kind of destination rural wellbeing tourists prefer?

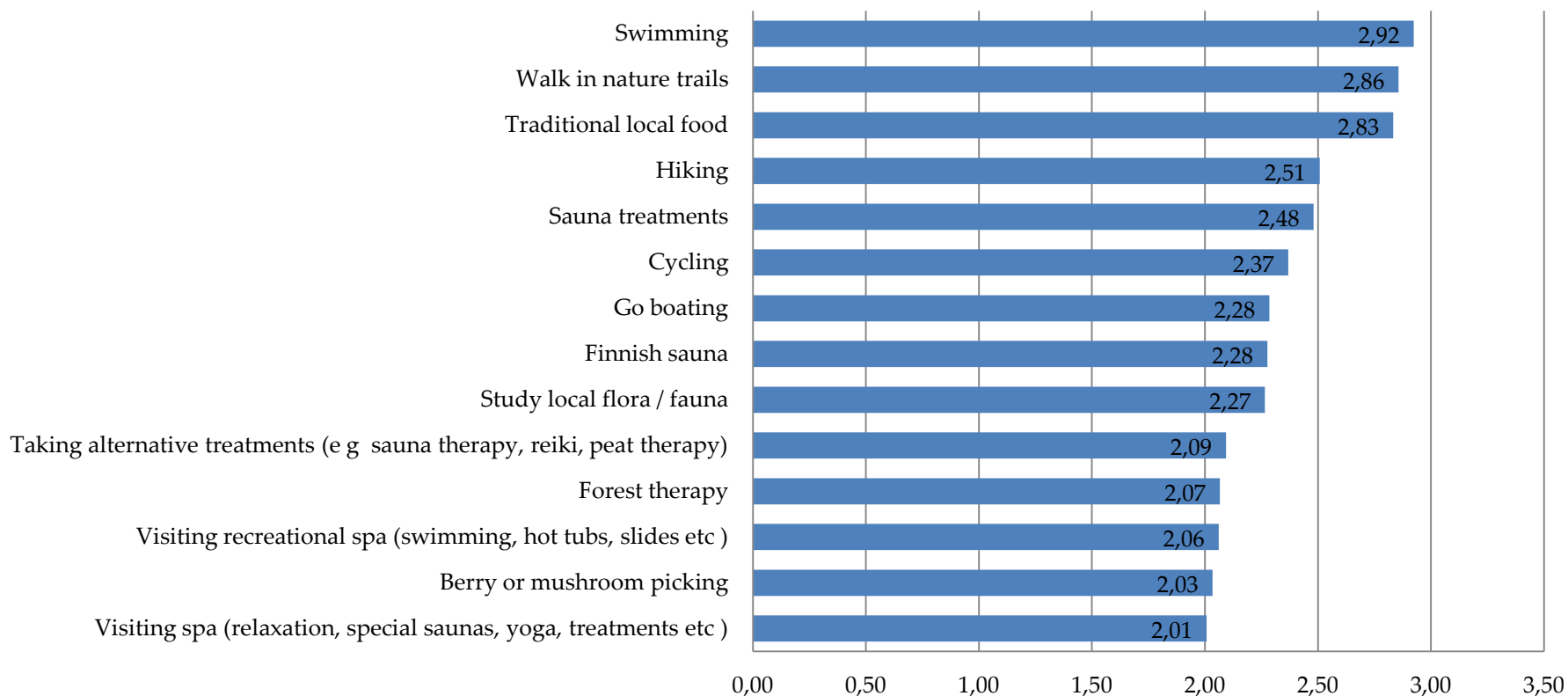
# Important rural wellbeing destination attributes (0: not important at all, 4: very important)

When you think about your perfect rural wellbeing destination, how important are the following attributes?



# Most interesting rural wellbeing activities (0: not important at all, 4: very important)

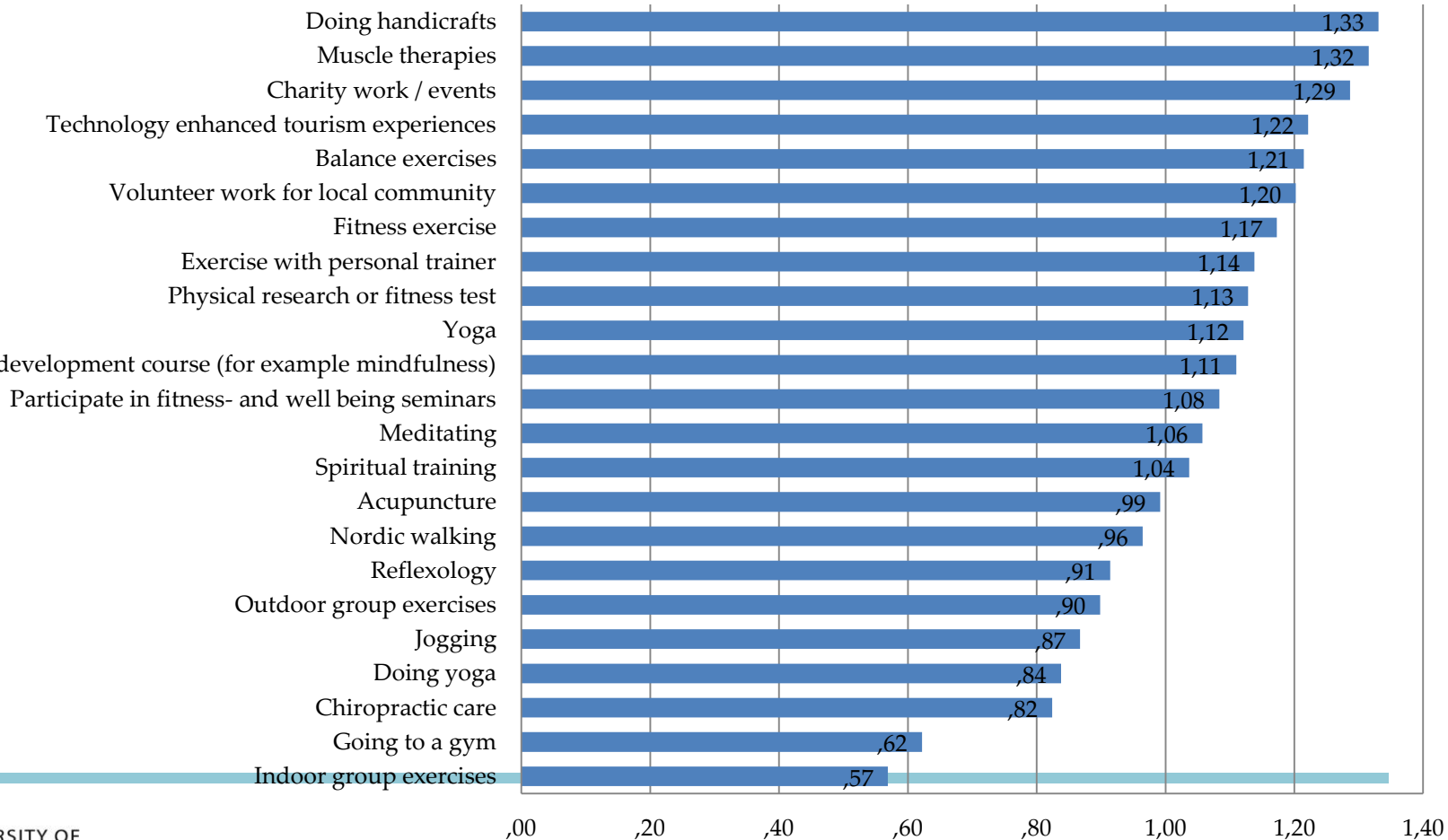
How important are the possibilities to enjoy following activities during your rural holiday?





# Least interesting rural wellbeing activities (0: not important at all, 4: very important)

How important are the possibilities to enjoy following activities during your rural holiday?

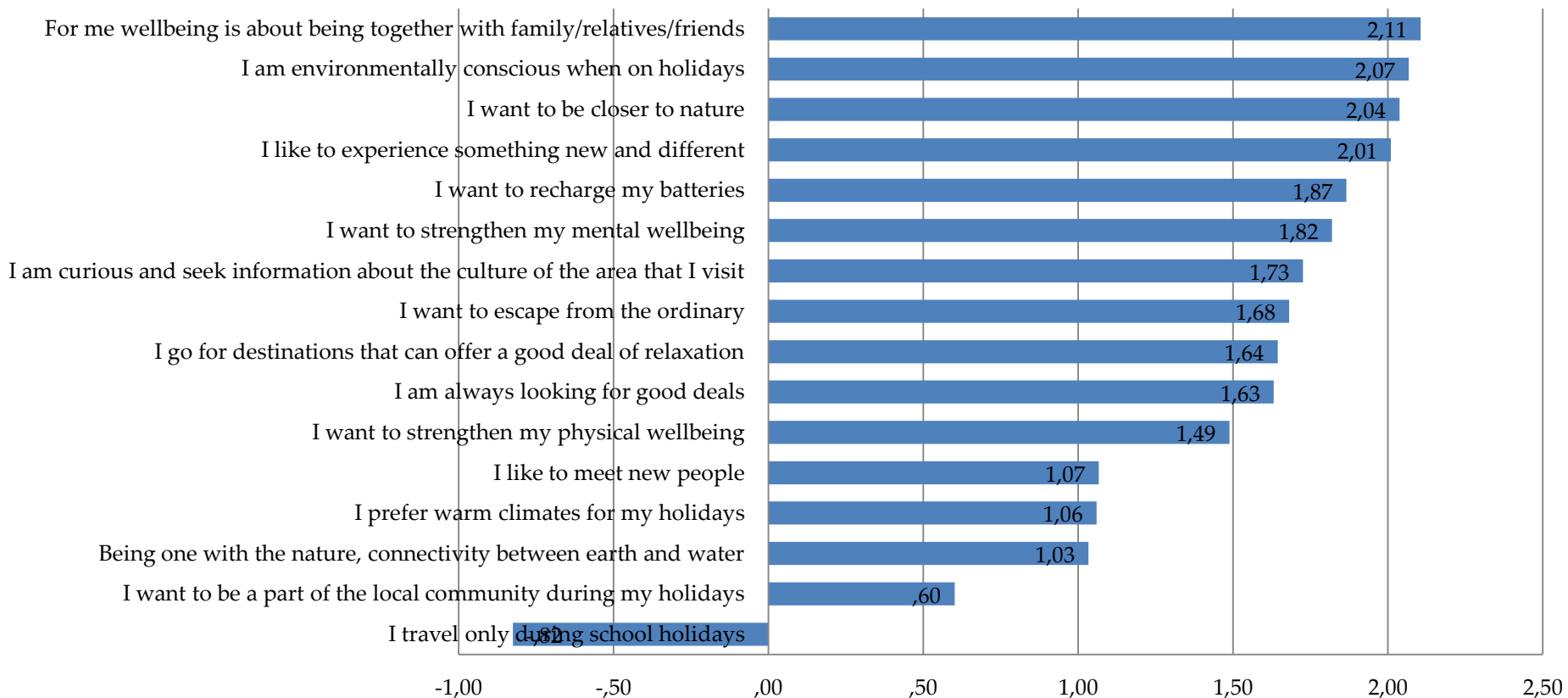


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# What motivates rural wellbeing holidays?

# Importance of travel motivations (-3: completely disagree, 3: completely agree)

When you think of yourself as a tourist, what characterizes you?

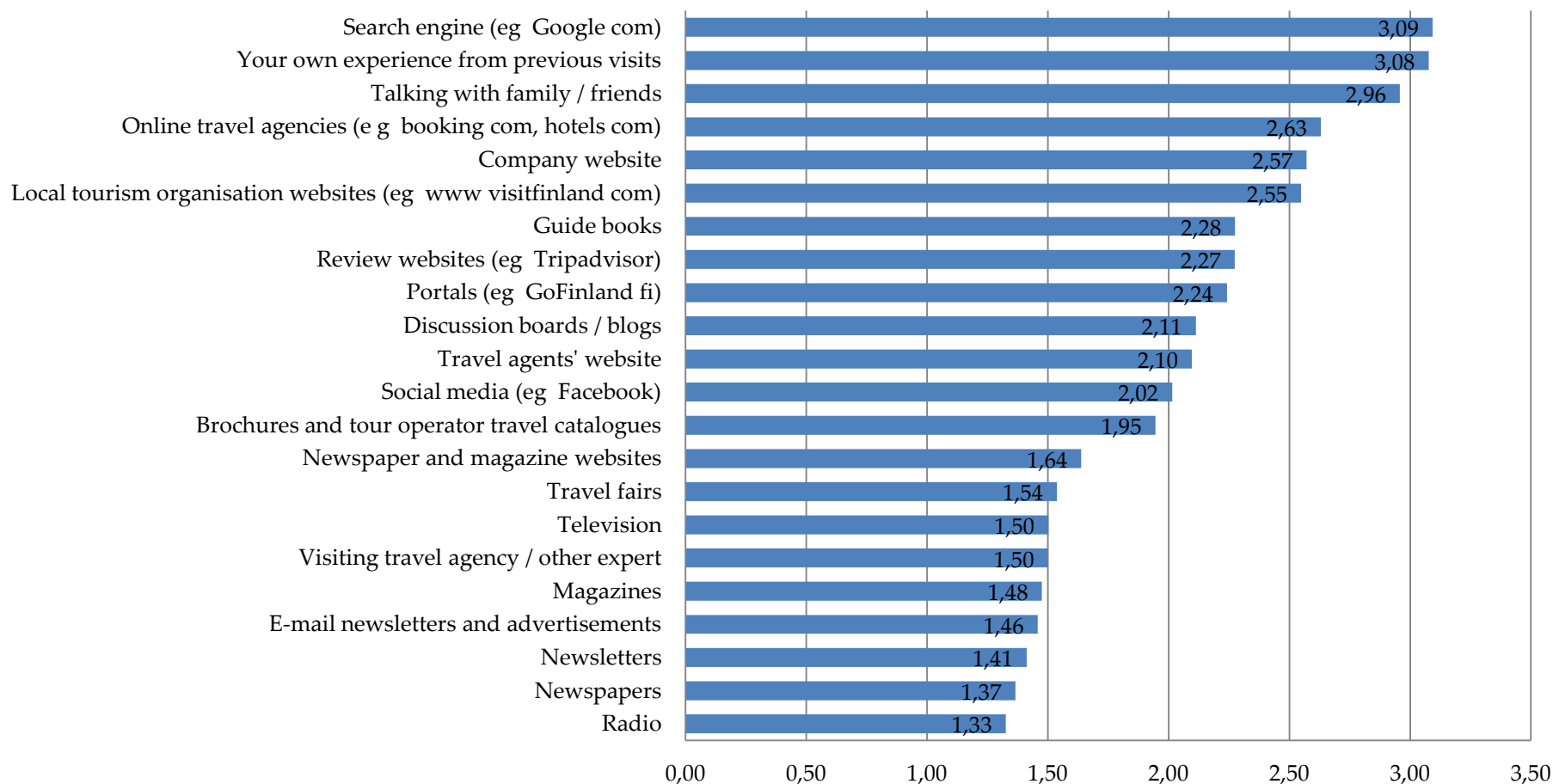


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# Where do rural wellbeing tourists find information?

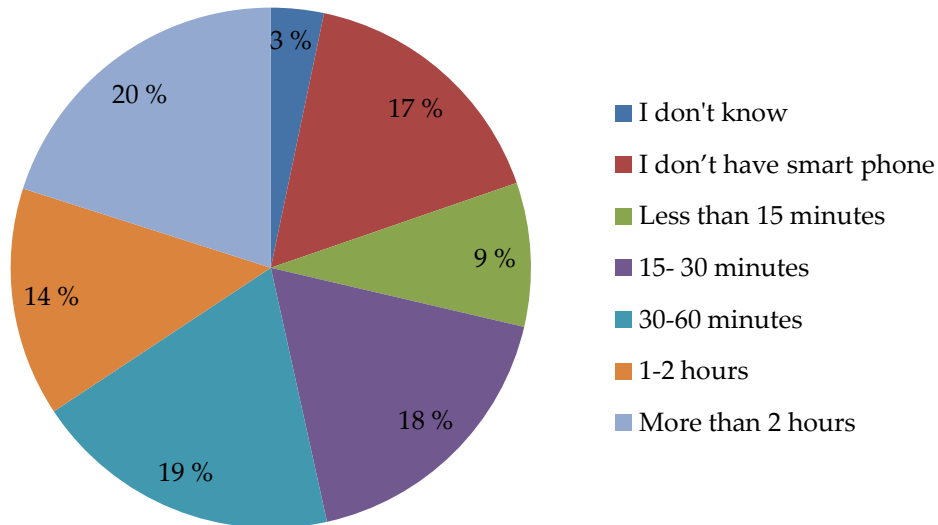
# Most important information sources (scale 0-4)

How important are the following information sources for you when you are planning a holiday?

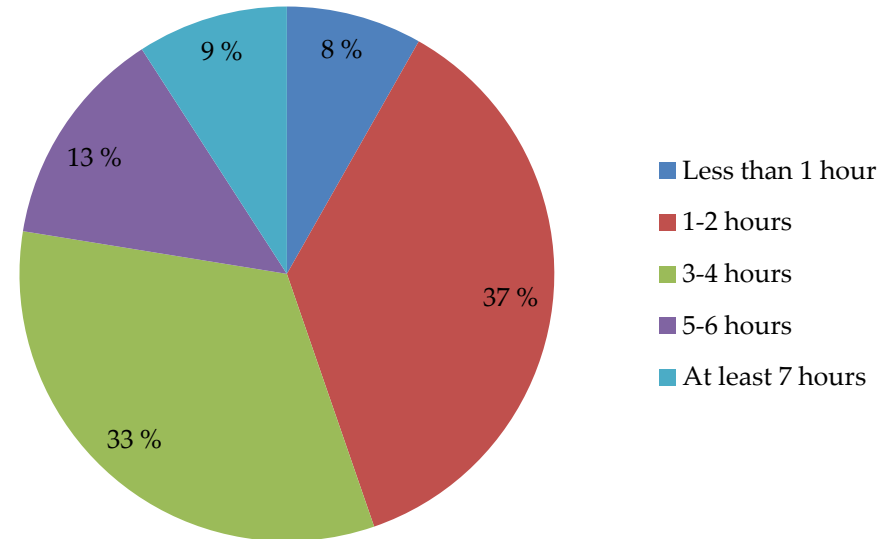


# Daily smartphone & Internet use

## Daily smartphone use



## Time spent online daily on average



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# 14 rural wellbeing products

## Principal component analysis with Varimax rotation

This analysis groups together wellbeing services that the tourists regard as similar to each other, creating a combination of wellbeing services that together for a wellbeing product.

- Products are divided into core services and ancillary services
  - Most of the tourists preferring one core service among product category are very likely to prefer all other core services.
  - Most of the tourists preferring core services also prefer some of the ancillary services.
  - Core services should be marketed and offered together with the option of choosing also ancillary services.
  - The higher the loadings, the more connected the services are together (1.000 is max)
  - Cronbach alphas confirm the reliability of the majority of the products ( $\alpha > 0,700$ )

# 1st Product family: Treatments and spa ( $\alpha=0,964$ )

Core services	Loadings
Visiting spa (relaxation, special saunas, yoga, treatments etc )	,836
Massage	,823
Taking traditional treatments (e g foot care, facial treatments, cupping therapy)	,723
Taking alternative treatments (e g sauna therapy, reiki, peat therapy)	,717
Hot stone massage	,664
Visiting recreational spa (swimming, hot tubs, slides etc )	,647
Muscle therapies	,627
Sauna treatments	,608
Thalassotherapy	,596
Finnish sauna	,595
Physical research or fitness test	,595
Balance exercises	,573
Participate in fitness- and well being seminars	,567
Fitness exercise	,552
Exercise with personal trainer	,548
Local fruit-based treatments	,546
<b>Ancillary services</b>	
Stress coaching	,416
Forest therapy	,367
Reflexology	,431
Chiropractic care	,420
Acupuncture	,464
Folk medicine	,376
Taking part in personal development course (for example mindfulness)	,304



## 2nd Product family: Slow living ( $\alpha=0,937$ )

Core services	Loadings
Slow living studies	,725
Participating in growing your own food	,716
Charity work / events	,699
Volunteer work for local community	,678
Silence tour	,666
Protection of local resources	,659
Digital detox	,648
Collect your own herbs	,612
Ancillary services	
Forest therapy	,400
Doing handicrafts	,355
Meditating	,353
Spiritual training	,385
Staying in an eco-villages	,443
Visiting an eco-village	,446
Technology enhanced tourism experiences	,383
Photography tours	,401
Local fruit-based treatments	,306

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## 3rd Product family: Exercises ( $\alpha=0,933$ )

Core services	Loadings
Indoor group exercises	,811
Outdoor group exercises	,699
Nordic walking	,650
Going to a gym	,638
Ancillary services	
Jogging	,474
Meditating	,335
Taking part in personal development course (for example mindfulness)	,374
Doing yoga	,455
Muscle therapies	,337
Physical research or fitness test	,383
Balance exercises	,340
Participate in fitness- and well being seminars	,356
Fitness exercise	,450
Exercise with personal trainer	,444

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## 4th Product family: Alternative medicine ( $\alpha=0,944$ )

Core services	Loadings
Reflexology	,723
Chiropractic care	,723
Acupuncture	,692
Folk medicine	,537
Ancillary services	
Spiritual training	,410
Hot stone massage	,409
Muscle therapies	,381
Thalassotherapy	,407
Balance exercises	,376
Stress coaching	,403

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## 5th Product Family: Local Life ( $\alpha=0,816$ )

<b>Core services</b>	Loadings
Doing handicrafts	,694
Buying local handicrafts and other local products	,678
Study local traditions (like weaving, embroidery)	,562
Cooking classes	,553
Traditional local food	,543
<b>Ancillary services</b>	
Collect your own herbs	,372

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## 6th Product family: Wilderness ( $\alpha=0,678$ )

Core services	Loadings
Go boating	,744
Fishing	,679
Berry or mushroom picking	,625
Swimming	,581

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## 7th Product family: Outdoor adventure ( $\alpha=0,880$ )

Core services	Loadings
Kayaking	,859
Canoeing	,846

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## 8th Product family: Meditation ( $\alpha=0,864$ )

Core services	Loadings
Meditating	,628
Taking part in personal development course (for example mindfulness)	,596
Doing yoga	,556
Ancillary services	
Spiritual training	,412
Folk medicine	,315
Stress coaching	,331

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## 9th Product family: Eco-village ( $\alpha=0,869$ )

<b>Core services</b>	Loadings
Staying in an eco-villages	,617
Visiting an eco-village	,569
<b>Ancillary services</b>	
Forest therapy	,367
Local fruit-based treatments	,395
Finnish sauna	,422
Sauna treatments	,451



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# 10th Product family: Outdoor activities ( $\alpha=0,608$ )

<b>Core services</b>	Loadings
Hiking	,716
Cycling	,563
<b>Ancillary services</b>	
Riding therapy	,394
Jogging	,338

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# 11th Product family: Learning nature ( $\alpha=0,742$ )

<b>Core services</b>	Loadings
Study local flora / fauna	,699
<b>Ancillary services</b>	
Walk in nature trails	,306
Protection of local resources	,424
Silence tour	,325
Study local traditions (like weaving, embroidery)	,449

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# 12th Product family: Walking in nature ( $\alpha=0,560$ )

<b>Core services</b>	Loadings
Walk in nature trails	,532
Traditional local food	,527
<b>Ancillary services</b>	
Trekking	,489

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## 13. Product family: Museums ( $\alpha=0,628$ )

<b>Core services</b>	Loadings
Visiting museums	,664
Technology enhanced tourism experiences	,517
<b>Ancillary services</b>	
Photography tours	,452
Visiting recreational spa (swimming, hot tubs, slides etc )	,353

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# 14. Product family: Sleeping

Core services	Loadings
Sleep more than at home	,828

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# Marketing channels for rural wellbeing activities

Correlation analysis

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# Five categories of information sources (PCA)

1. Traditional media
  - Magazines, Newspapers, Radio, Television, Newspaper and magazine websites, Guide books, Brochures and tour operator travel catalogues
2. Experts
  - Visiting travel agency / other expert, Newsletters, Travel fairs, E-mail newsletters and advertisements, Travel agents' website
3. Social Media
  - Discussion boards / blogs, Social media (eg Facebook), Review websites (eg Tripadvisor), Online travel agencies (e g booking com, hotels com)
4. Destination information
  - Local tourism organisation websites (eg [www.visitfinland.com](http://www.visitfinland.com)), Portals (eg GoFinland fi), Search engine (eg Google com)
5. Personal information
  - Your own experience from previous visits, Talking with family / friends, Company website

# Correlations between information channels and rural wellbeing products

**Correlations**

		Treatments and spa	Slow living	Exercises	Alternative medicine	Local life	Wilderness	Outdoor adventure	Meditation	Eco-village	Outdoor sports	Learning nature	Walking in nature	Museums	Sleep
Traditional media	Pearson Correlation	,041	,245	,158	,290	,091	,098	,000	,073	-,042	-,240	,116	,065	,200	-,007
	Sig. (2-tailed)	,545	,000	,020	,000	,182	,151	,996	,283	,543	,000	,087	,342	,003	,919
	N	217	217	217	217	217	217	217	217	217	217	217	217	217	217
Experts	Pearson Correlation	,327	,175	,334	,154	,125	,005	,016	-,039	,072	,022	,071	,019	,141	-,050
	Sig. (2-tailed)	,000	,010	,000	,023	,067	,947	,814	,567	,293	,747	,296	,778	,037	,465
	N	217	217	217	217	217	217	217	217	217	217	217	217	217	217
Social media	Pearson Correlation	,120	,078	,147	,034	,052	,040	,083	-,040	,047	,115	-,144	,026	-,037	,051
	Sig. (2-tailed)	,077	,252	,030	,613	,449	,560	,221	,562	,489	,092	,033	,701	,590	,453
	N	217	217	217	217	217	217	217	217	217	217	217	217	217	217
Destination information	Pearson Correlation	,031	,109	-,066	,148	-,030	,098	-,004	,074	-,062	-,008	,121	,232	,201	-,017
	Sig. (2-tailed)	,647	,108	,331	,029	,664	,151	,950	,276	,367	,909	,075	,001	,003	,807
	N	217	217	217	217	217	217	217	217	217	217	217	217	217	217
Personal information	Pearson Correlation	,101	,093	-,059	,005	,086	,257	-,063	,012	,053	,177	,111	,152	,056	,062
	Sig. (2-tailed)	,139	,174	,386	,945	,207	,000	,358	,859	,435	,009	,104	,025	,414	,367
	N	217	217	217	217	217	217	217	217	217	217	217	217	217	217

Yellow: Very good marketing channel for the product category(top row), Orange: Good, Red: Bad



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## Analysing the correlations:

- People preferring treatments and spas use experts to find information.
- Slow living services are best marketed through experts and traditional media.
- Experts are also important in marketing exercise services.
- Alternative medicine services should be marketed through traditional media.
- Museums should be marketed in traditional media and destination websites.
- Nonetheless, search engines are most often used information channel.

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## Conclusions:

- Transnational rural wellbeing products are viable.
  - People still prefer to travel to near-by countries.
  - Short holidays up to four nights are preferred.
  - Family is most popular travel party.
- Rural wellbeing tourism is also connected to water and quietness.
  - Moving around in the nature, eating local food.
  - Environmental friendliness is a must for rural wellbeing companies and should be actively promoted.
- Rural wellbeing tourists can take holidays outside school holidays, but only for longer weekends.
- Search engines are most often used information channel and should be focused on.
  - Also personal information is very important, meaning that the quality of the rural wellbeing services must be very high.

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## Conclusions (cont.)

- The rural tourism services should be considered as categories.
  - 14 rural wellbeing product families.
    - Core services should almost always be offered and marketed together
    - Ancillary services should support core services and be an option for tourists.
- For some services special attention need to be paid to information channels used.
  - Traditional media is good for slow living, alternative medicine and museum products
  - Experts should be used in marketing of treatments and spas, exercises and slow living.
  - Personal information is important for those enjoying wilderness services and outdoor sports.

*For more information see*  
[www.uef.fi/mot/prowell](http://www.uef.fi/mot/prowell)  
[www.matkailututkimus.fi](http://www.matkailututkimus.fi)  
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